

## MAKE STOCK DONATIONS via ELECTRONIC TRANSFERS TO ST. MATTHEW'S HOUSE

Thank you for your interest in supporting St. Matthew's House. To help facilitate a stock donation, please use the following three steps:

### **Step 1:** Initiate the Stock Transfer

Security can be gifted to St. Matthew's House via electronic transfer or by physically mailing the paper certificates to St. Matthew's House. Either method is acceptable, but it is necessary for you to contact your broker to initiate the transfer. A receipt for stock donations cannot be issued, unless your name is released.

#### **Note:**

When notifying your broker please specify the type of stock and number of shares you would like to transfer. Let him or her know your name must accompany the stock transfer (information used for audit purposes and acknowledgment of donation).

### **Step 2:** Send the Securities to St. Matthew's House

#### **If Sending Electronically:**

Moran Edwards Asset Management Group (Moran Wealth Management)  
DTC 0141  
(Charitable/Nonprofit)  
Receiving account registration: St. Matthew's House  
Receiving account #: BDT-187723  
Contact person: Angel Nurse, Co-Director of Client Relations  
P: (239) 920-4413 Direct | F: (239) 431-5239  
[Angel.Nurse@MoranWM.com](mailto:Angel.Nurse@MoranWM.com) | [www.MoranWM.com](http://www.MoranWM.com)

#### **If Sending by Registered Mail:**

Mail your certificates with a Stock Waiver Form or letter in separate envelopes, by registered mail, to:

Attn: Development Department  
St. Matthew's House  
2601 Airport Road South  
Naples, FL 34112

#### **Note:**

Certificates already registered in the name of St. Matthew's House do not require a stock waiver for execution of the transfer.

**Step 3:** Notify St. Matthew's House via Email or Mail

Each time a gift of stock is donated, regardless of the method chosen to deliver a stock gift, information about the gift for audit and acknowledgment purposes is needed.

If sending a letter or an email is preferred, the following information is needed at the time of transfer:

- ▶ Donor's full name and complete address
- ▶ Name and number of securities transferred
- ▶ Date of transfer
- ▶ Designation where the gift should be directed (optional)

Send to:

Attn: Development Department  
St. Matthew's House  
2601 Airport Road South  
Naples, FL 34112

Email: [gifts@stmatthewshouse.org](mailto:gifts@stmatthewshouse.org)  
P: (239) 687-7629 | F: (239) 732-5451